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Item 3 (d) of the provisional agenda*

Demographic and social statistics: Rio Group on Poverty Statistics

Report of the Rio Group on Poverty Statistics

Note by the Secretary-General

In accordance with a request of the Statistical Commission at its thirty-second session,** the Secretary-General has the honour to transmit to the Commission the report of the Rio Group on Poverty Statistics (Convener: Brazil). The Commission may wish to review the work programme of the Group.

* E/CN.3/2002/1.

** See *Official Records of the Economic and Social Council, 2001, Supplement No. 4 (E/2001/24)*, chap. I, sect. A.



Report of the Rio Group on Poverty Statistics

Purpose

The main objectives of the expert group are to harness the experience and concerns of different groups and organizations in the world that are working on the measurement, interpretation and use of poverty statistics, especially when such work is being done by or in close contact with statistical offices. The identification of the indicators, methodologies and statistical sources being used should allow the preparation of a document or reports containing the state of the art in matters of poverty measurements, common procedures and best practices. At the same time, the most important difficulties could be identified and experts working with similar problems and topics could cooperate and thereby improve the quality and relevance of measurements.

Year organized

1996.

Participants

Countries

Argentina, Australia, Belarus, Botswana, Brazil, Canada, Chile, France, India, Indonesia, Mexico, Netherlands, Nigeria, Peru, Portugal, South Africa, Spain, Switzerland, Turkey, Uruguay, United Kingdom, United States of America.

Agencies and other institutions

Centro Latinoamericano de Demografía, Economic Commission for Africa, Economic Commission for Latin America and the Caribbean, Economic and Social Commission for Asia and the Pacific, Statistical Office of the European Communities, Human Science Research Council, Inter-American Development Bank, International Labour Organization, United Nations Latin American and Caribbean Institute for Economic and Social Planning, London School of Economics and Political Science, Organisation for Economic Cooperation and Development Paris 21, Pan American Health Organization/World Health Organization, Townsend Centre for International Poverty Research, the World Bank, United Nations

Development Programme, United Nations Children's Fund, United Nations Population Fund, United Nations Statistics Division.

Meetings

- First meeting: Santiago, 7-9 May 1997.
- Second meeting: Rio de Janeiro, 13-15 May 1998.
- Third meeting: Lisbon, 22-24 November 1999.
- Fourth meeting: Rio de Janeiro, 15-17 October 2001.

Topics considered

Measurements oriented towards synthetic indicators or policy for poverty alleviation; analytical classifications of synthetic indicators of poverty statistics: absolute poverty (poverty lines and unmet basic needs approach), relative poverty, objective and subjective poverty; poverty dynamics; relations between poverty and other conceptual categories used in social policy, such as social exclusion, vulnerability and social rights; microlevel approach (household and individuals) to poverty measurements associated with policy for poverty alleviation.

In all those topics, methodological and procedural issues more widely used within different measurements of poverty have been examined and compared. The Group has identified:

- (a) The most important methodological and statistical challenges in which participants are working;
- (b) Statistical sources, concepts and classifications used for poverty measurements;
- (c) Work under way to improve the timeliness and quality of sources and estimates;
- (d) International experience to move towards common practices in the measurement of poverty;
- (e) Institutional agreements towards the comparability of measurements in different regions;
- (f) Use of poverty statistics in the monitoring of poverty alleviation policies at the international level.

Products

Papers and final reports of the first three meetings have been published by ECLAC, bibliographies of which can be accessed from the ECLAC publications web site at: <http://www.eclac.org/publicaciones/default.asp?idioma=IN> or <http://www.eclac.org/publicaciones/> (Spanish) under the documents codes LC/R.1814, LC/R.1960 and LC/R.1998. The agenda and documents of the meetings can be found on the web site of the Group at: www.ibge.gov.br/poverty.

Planned activities

The Group has compiled a very significant quantity of documents that reflects the work finished and under way in the area of poverty statistics. It has been possible to group the work in the following headings: absolute poverty (including income measurement topics); unmet basic needs; poverty deprivation and social exclusion, including relative and subjective poverty; poverty dynamics; equivalent scales; strategies for improvement of information; international strategies for poverty alleviation; and international comparisons. Those topics only have an operative character since different groups of participants are working on them. Therefore, it is possible to constitute small working groups able to produce some synthetic work on those topics, which will facilitate the achievement of the future work planned.

Expected future products (dates)

The next meeting will discuss the work achieved on the topics above with the goal of producing a compendium on best practices in the area of poverty statistics. After evaluating the work done, the topics will be ordered in a more conceptual and operative index. The Group would like to submit to the Commission the work it has conducted and the outline of the compendium for evaluation by the Commission at its thirty-fourth session, in March 2003.

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Demographic and Social Statistics: Siena Group for Social Statistics

Report of the Siena Group for Social Statistics

Note by the Secretary-General

In accordance with a request of the Statistical Commission at its thirty-second session,** the Secretary-General has the honour to transmit to the Statistical Commission the report of the Siena Group for Social Statistics. The Commission may wish to review the work programme of the Group and offer advice on the direction of its future work.

* E/CN.3/2002/1.

** See *Official Records of the Economic and Social Council, 2001, Supplement No. 4 (E/2001/24)*, chap. I, sect. A.



Report of the Siena Group for Social Statistics

Purpose

To promote and coordinate international cooperation in the areas of social statistics by focusing on social indicators, social accounting, concepts and classifications, and an analysis of the linkages and frameworks for integrating social, economic, and demographic data for the purposes of policy formulation and analysis.

Year organized

1993

Participants

Australia, Austria, Canada, Czech Republic, Denmark, Finland, France, Germany, Greece, Hungary, Ireland, Israel, Italy, Japan, Mexico, Netherlands, New Zealand, Norway, Poland, Portugal, Republic of Korea, Singapore, Spain, Sweden, Switzerland, United Kingdom, United States, Economic Commission for Europe, European Commission, Statistical Office of the European Union (Eurostat), Organisation for Economic Cooperation and Development, Economic Commission for Latin America and the Caribbean, United Nations Statistics Division, United Nations Development Programme (UNDP).

Meetings and other events

1. Siena, Italy, October 1993.
2. Stockholm, June 1994.
3. Oslo, June 1995.
4. Paris, June 1996.
5. Neuchâtel, Switzerland, June 1997.
6. Sydney, December 1998.
7. Maastricht, the Netherlands, May 2000.

An international summer school on social statistics is organized by the Training Institute for European Statisticians (TES) and the Siena Group for Social Statistics in cooperation with the University of Siena, and is sponsored by the European Commission (Eurostat). The summer school programme is developed around three courses/three themes arranged over a period of three consecutive years. The first theme was "Inequality and equity" (1998), the second

(1999) was "Participation, discrimination and exclusion" (approached mainly from the meso level) and the third (2000) was "Cohesion, integration and policy analysis" (approached mainly from the macro level).

Topics considered

1. National accounts, economic analysis and social statistics.
2. Social reporting and social accounting.
3. Monitoring social exclusion in education and labour markets.
4. Intergenerational relations and social mobility.
5. On the way to a multicultural society.
6. Families at the end of the twentieth century.
7. Accounting in social statistics and indicators for social development.

In the past eight years, a lot of work on these topics has been done; labour accounting has become well established as a method and is incorporated in the work plans of several national statistical institutes. Similarly, educational and health accounting, as well as time-use based satellite accounts, are at different stages of development. National accounts have been extended to data on the labour market, social protection and household production. Social accounting matrices are being further developed. Conceptual frameworks linking monetary and non-monetary phenomena are being developed and tested. Government policy is increasingly monitored objectively with regard to its effectiveness. To that end, sets of social indicators have now been developed and various countries and international organizations already use several sets of key indicators to monitor specific policy fields (e.g., employment, education, social exclusion and health). Within the European Union, a set of structural indicators is being developed to monitor the process of European economic and social reform. The Statistical Commission has been entrusted by the Economic and Social Council to coordinate a core list of indicators for use in the follow-up to the main United Nations conferences and the United Nations Development Assistance Framework-common country assessment processes at the country level. The Economic

Commission for Europe (ECE) in cooperation with UNDP, has been working on a framework for monitoring social trends and policies in transition economies.

Products

Volumes of proceedings of each meeting, containing all the papers presented and summaries of the discussions, have been issued. The Group has also published three thematic publications:

"Families at the end of the twentieth century" (1999), available from the Australian Bureau of Statistics;

"Monitoring multicultural societies: a Siena Group report" (1997), available from the Swiss Federal Statistical Office;

"A statistical portrait of youth exclusion" (1997), available from ISTAT, Centro Diffusione.

Theme of the 2000 meeting

Accounting in social statistics and indicators for social development

Rationale: the ongoing transformation of social statistics from a wide variety of isolated statistics into integrated systems (comprehensive surveys, social accounting matrices etc.) is considered to be the logical consequence of the increased need on the part of modern policy makers to monitor social and economic developments through a restricted set of authoritative indicators, based on a consistent framework of statistical information via internationally comparable statistical information (indicators) and harmonization efforts. Indicators and integration were discussed in earlier meetings of the Group as well as in the context of the Mondorf seminars. The experience with building statistical systems and developing and using indicators is not yet equally shared. A variety of international organizations have developed sets of social (key) indicators and formulated requirements for basic statistical information. In anticipation of those policy demands, some national statistical institutes have experimented with integrating surveys, others have put much effort into building accounting systems, and others have investigated the possibilities of using existing and new registers and other administrative sources. To consolidate the achieved progress and to stimulate further developments, the Maastricht meeting

attempted to provide a forum to summarize and share existing experience, find new approaches and develop common strategies. The meeting was divided into five sessions as follows:

1. State of the art and its relevance to the policy agenda.
2. Why and for whom indicators are produced.
3. How we decide what to measure.
4. How data are collected and what provisions are made for consistency and comparability.
5. Linking the monetary and non-monetary phenomena that make up social accounting systems.

The conclusions of the meeting stressed the need for more structured studies and cooperation in the field of indicators and in the field of methodologies for combining data from different sources. For that purpose, subgroups have been proposed to develop cooperation projects in those fields among participants from different countries. The Group also stressed its role in training in social statistics via international summer school activities.

Forthcoming meetings

The 2001 meeting of the Group was scheduled to be organized by the Portuguese National Statistical Institute. For logistical and organizational reasons, however, that could not be realized, which forced the Chair and some core members of the Group to evaluate the direction of the activities of the Group. It was concluded that in the field, as described under topics considered, much work still has to be done in respect of preparing a handbook on statistical data integration, the implementation of micro-macro links, the concept and measurement of social capital in the context of the knowledge-based society and the development of quality assessment of social statistics. Therefore, on 3 and 4 December 2001, an intermediate meeting of the Group will be organized in Geneva, hosted by ECE. The purpose of that meeting will be to outline the strategy of the Group for the next few years and to set its strategic medium-term goals, bearing in mind the developments in the field of social statistics, as mentioned above. A strategy paper will be prepared for the meeting, based on the conclusions of the Maastricht meeting of the Group in 2000 and recent developments in social policy.

The first series of summer school programmes was successfully completed in 2000. TES has been very supportive in the organization of those schools. The structure of the lectures of the summer schools was designed along the different levels (micro, meso and macro) and domains of social statistics. As a consequence of changes in the formal relationship between Eurostat and TES, the organizational support from TES will be reconsidered. Some element of the summer school programme being directly linked to a Group meeting will be the most likely option.

The United Kingdom Office for National Statistics is considering organizing the next meeting of the Group, to be held in late spring 2002.

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The Siena Group also maintains an Internet site within the English language section of the ISTAT site at:
<http://www.istat.it/Primpag/siena2.htm>.



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Demographic and social statistics: Washington Group on Disability Measurement

Report of the Washington Group on Disability Measurement

Note by the Secretary-General

The Secretary-General has the honour to transmit to the Statistical Commission the report of the Washington Group on Disability Measurement. The Commission may wish to:

- (a) Review the objectives and work programme of the Group;
- (b) Comment on whether its proposed work programme is attainable.

* E/CN.3/2002/1.



Report of the Washington Group on Disability Measurement

I. Introduction

1. The International Seminar on the Measurement of Disability was held in New York from 4 to 6 June 2001. The Seminar, which brought together about 100 persons from developed and developing countries, was sponsored by the United Nations Statistics Division, the United Nations Children's Fund, the Statistical Office of the European Communities and the Centers for Disease Control and Prevention of the United States of America. Participants included statisticians from national statistical offices, representatives of the disability community, users of disability data, experts in the field of disability statistics, methodologists and representatives of the World Health Organization and other health organizations. The meeting participants, who represented a broad array of developed and developing country experts in disability measurement for statistical reporting, focused on:

(a) Reviewing and assessing the current status of methods used in population-based data-collection activities to measure disability in national statistical systems, with particular emphasis on questionnaire design;

(b) Developing recommendations and priorities to advance work on the measurement of disability;

(c) Contributing to building a network of institutions and experts, including producers and users of disability statistics, to implement the development of the field of disability measurement.

2. The programme, which included introductory remarks from the Under-Secretary-General for Economic and Social Affairs of the United Nations Secretariat, the Director of the United Nations Statistics Division and the Director of the Division for Social Policy and Development of the Secretariat, covered many important topics related to measurement of disability. Highlights of the programme were national experience in the development of instruments for measuring disability; international initiatives in the measurement of disability and techniques to improve analysis of data; the implications of the International Classification of Functioning, Disability and Health (ICF) for the measurement of disability, particularly the new elements focusing on environment and participation; and discussions of questionnaire design

and survey features. Another important element of the seminar was the focus on the measurement of disability among special populations, such as children and those with cognitive or psychological impairments.

II. Seminar recommendations

3. Seven priority areas were identified for further work to improve the measurement of disability, and it was agreed that a city group be established to implement the recommendations of the seminar. The National Center for Health Statistics (NCHS) of the Centers for Disease Control agreed to host the first meeting, which will take place in Washington, D.C.

4. The recommendations of the Seminar included the following:

(a) That ICF be used as the framework for measurement of disability in future work. Short and long sets of questions for data collection should be developed based on ICF. Particular attention is needed in the development of instruments to measure the new ICF elements of environment and participation;

(b) That global measures and instruments be developed for use in censuses and surveys that do not focus primarily on disability;

(c) That assessment of the impact of cut points and multi-point response scales on the measurement of disability, including use of ICF qualifiers with relationship to difficulty, assistance, extent, satisfaction etc., are important methodological issues to be addressed;

(d) That emphasis be placed on improving the comparability of disability data cross-nationally, while being sensitive to the cultural and resource differences encountered in different countries, including the harmonization of concepts and definitions, the development of a core set of reference items and the use of statistical techniques, such as item response theory;

(e) That attention be paid to the development of instruments and issues associated with measuring disability among special populations, such as children, the elderly, institutionalized populations, and persons with cognitive and psychological impairments;

(f) That the impact of question design on estimates of persons with disabilities be studied, including methodological issues of self versus proxy respondents, household versus person-based questions, multi-point scale cut points, negative terminology etc.;

(g) That collaboration on disability data topics be enhanced by including stakeholders and data users, developing working relationships and networks among countries, and exchanging information and establishing guidelines for the use of data.

III. Planning committee

5. The United Nations Statistics Division suggested members for a committee to plan the first meeting of the Washington Group on Disability Measurement, including:

Antonio Escobedo Aguirre, Instituto Nacional de Estadística Geografía e Informática (Mexico)

Ms. Ssekabira, Ministry of Gender, Labour and Social Development (Elderly and Disability Affairs) (Uganda)

Marleen de Smedt, Statistics on Health and Safety, Statistical Office of the European Communities

Joanne Hillermann, Australian Bureau of Statistics

Ken Black, Australian Bureau of Statistics

Ros Madden, Australian Institute of Health and Welfare

Jennifer Madans, National Center for Health Statistics (United States)

6. In addition to Ms. Madans, the following NCHS staff are supporting the planning committee: Barbara Altman, Linda Blankenbaker, Dana Carr, Marjorie Greenberg, Sam Notzon, Paul Placek, Beth Rasch and Diane Shinberg. Logistic support is being provided by Pat Drummond and Barbara Hetzler.

7. The United Nations Statistics Division is represented in the Group by Margaret Mbogoni (focal point) and Angela Me, and the World Health Organization by Bedirhan Ustun.

8. The Group began planning its activities in late August 2001. Through email correspondence and

telephone calls, the planning committee has developed a set of tentative objectives for the Group and a draft agenda for three proposed meetings, with a more detailed draft agenda for the first meeting, to be held in Washington, D.C., from 18 to 20 February 2002 (see annex).

IV. Objectives of the Group

9. The planning committee has proposed the following as draft objectives for the Group, subject to amendment and approval by Group members when they meet in February 2002. Adequate time will be set aside at the meeting to discuss the objectives and agenda for the Group.

10. The objectives as currently proposed are as follows:

(a) Recommend principles to guide the development of global measures of disability, for use in a census format, that are culturally compatible and will provide the basic necessary information on disability throughout the world;

(b) Recommend one or more extended sets of survey items to measure disability or principles for their design, to be used as components in population surveys or as supplements to specialty surveys. Such principles for developing questions should be representative of the ICF model and culturally comparable. Modular components can be conceptualized so that they may be combined to encompass the body/structure, activity/participation and environmental components of disability, where possible;

(c) Address the methodological issues associated with measurement of disability considered most pressing by the participants.

11. In order to meet those objectives it will be necessary to:

(a) Review and assess cross-cultural differences in disability definitions, the purposes of collecting disability information and barriers to the collection of accurate disability data, as a step in promoting the comparability and usefulness of disability data collected either through censuses or surveys;

(b) Review the sets of global measures used in censuses and survey measures currently in use or

proposed in participating countries, developing the underlying principles that indicate successful measurement;

(c) Evaluate methodological problems in developing measures, particularly in the new areas of measurement of participation and environment, as well as in the measurement of special populations in order to promote the development of culturally compatible measures in those areas.

12. In addition, it will be necessary to continue building a network of institutions and experts, including producers and users of disability statistics, in order to implement the development of the field of disability measurement so that data-collection instruments will be put to use to produce the information needed.

Annex

Provisional agenda/programme of work for the first meeting of the Washington Group on Disability Measurement

Topic: Comparability of cross-national disability measures

Day 1

Morning

1. Introduction and overview

Presentations will be made on the current situation of disability measurement, providing (a) a welcome to participants, (b) a review of the conclusions of the International Seminar on the Measurement of Disability, (c) setting the goals for the meetings of the Washington Group on Disability Measurement.

2. Goal-setting and agenda adjustment

Participants will be asked to approve or modify the proposed goals, and to adjust or make suggestions for additional topics to be addressed in subsequent meetings.

Afternoon

3. Purpose of measurement

Select participants, representing both developed and developing countries, will identify the purposes for disability measurement in their societies and relate them to the conceptual components of the ICF model. This will represent the type of conceptual operationalization that will need to be examined and decided upon in the work that follows.

4. Discussion of the Principles and Recommendations for Population and Housing Censuses, Revision 1, section on disability (paras. 2.258-2.276)

The Group will review the concepts, definitions and classifications of disability, as well as the recommended approach to collecting data on disability in the census recommendations, and will make revisions to them based on ICF. In addition, it will discuss the process that will monitor the implementation of those recommendations.

5. An examination of the ICF model

The Group will be updated on the status of the development of questions to create measures in each of the domains of the model. An inventory of existing instruments available will be provided as a background document, and the Group will discuss how selected instruments are reflecting the ICF model.

Evening

Reception or dinner

Day 2

Morning

6. Global measures of Disability

The Group will discuss the types and numbers of questions that could usefully be used in census formats. Of particular concern would be the impact of the cut point associated with limited questions on the estimates of disability that would result.

7. Exploring the confounding function of assistive device use

The Group will explore the identification of disability and whether the lack of specification of assistive device use alters a true count of what is happening within a population. Does the lack of accurate consideration of all devices and their use compromise our measures? How does that affect global indicators?

Afternoon

8. What is the relationship of global measures to ICF?

The Group will examine what components of ICF are most useful for measuring disability in a more global context with limited questions. Are global measures of environment and participation possible? Are measures for separate populations possible in a census context?

9. What are the unique cultural practices that influence the nature of the environment or prescribe or proscribe participation?

To ask participation questions in a culture that prohibits certain types of participation to certain members of the population is an exercise in futility. Presentations should address the cultural attitudes within which the questions must be framed. Does this problem constitute a barrier to collecting comparable data?

10. What are the unique cultural issues that act as barriers to collecting data? are there common barriers to data collection that occur cross-culturally? Possible topics include stigmatization and language barriers in multi-language cultures. How common are these across different cultures? A presentation could be made on the ways to involve persons with disabilities in the planning process and what is necessary to allow for their full participation.

Evening

Unscheduled activities

Day 3

Morning

11. Discussion of the comparability of information cross-nationally

Using materials from the previous day, the Group will split into two or more subgroups for a discussion of the comparability of the definitions, formats and forms of data collections. How well do the global indicators serve the purposes of various countries? The objective would be to identify the areas of greatest differences and possible solutions to those differences. In addition, another purpose of this exercise

would be to create working groups that might possibly form alliances that would continue to work after the Group had completed its work. Obviously, Eurostat has accomplished this, but many of the developing countries could probably use this networking opportunity. Subgroups will return at mid-morning to report their findings and discuss the nature of the most difficult differences. This will also provide an opportunity to develop further agenda items for subsequent meetings.

12. Cross-cultural validity of global indicators

Can we agree on what specific global indicator or set of global indicators is workable?

Afternoon

13. Conclusion

To facilitate discussion, representatives of participating countries will be asked to send a description of the sources of data used to gather information on disability, and also to describe how the information is used in their cultures based on guidelines set out by the planning committee. In addition, each participating country will be asked to indicate the legal definitions of disability in place in their societies. Both pieces of information will be collected prior to the concluding meeting for distribution at that meeting, and will be used to facilitate the discussion of compatibility.

* * *

Possible future topic areas

The following are possible future topic areas:

Sampling issues

Self versus proxy respondents

Question design

Terminology

Response options

Use of qualifiers

Building blocks: can questions be developed in add-on components that will allow expansion or contraction of disability unit as resources and space allow?

Measurement error

Scales

Statistical techniques to promote comparisons

Status of environmental and participation measures

Successful supplements in use and their problems

Incorporation of institutionalized populations in prevalence estimates

Measurement of disability among children, adolescents and elderly

Problems associated with various age groups

Self/proxy issues

Cognitive limitations

Mental health problems

Psychological and cognitive impairments

Special cultural barriers to data collection

Uses of data

Constructive use of disability in overall health measures

Data users' needs: policy considerations
